FEi | *Focused eHealth Innovations*

Web Infrastructure for Treatment Services (WITS)

WITS Module Documentation for: Linked Consents

Table of Contents

A. Overview

Purpose

Linked Consent features were developed in order to allow better management of client records across Agencies, and to be able to integrate consented records into client records rather than having them accessible only through the Client Search screen. These features will allow users to manually create a link between two client records in order to indicate that they are the same person, and will also allow for the "filing" of consented activities into the client record.

New Features

- Addition of a "Linked Consents" module at the Client List menu pane
- Improved relevance of the Clients with Consents from Outside Agencies list
- Connection between client records in two different agencies
- Linked Consent permissions tied to the Clinical Supervisor Role

Roles Impacted

Clinical Supervisor

Responsibilities:

1. Be able to confirm that two different client records do or do not refer to the same individual

2. Link or unlink those client records

WITS Administrator

Responsibilities:

1. This role has the same access as the Clinical Supervisor role for the purposes of this feature.

B. Process Workflow – New Client

This follows the impact to the Consent & Referral processes, for Agencies A and B. In this first scenario, the Client Daisy Duck does not already exist in Agency B.

Figure 1: New Client Profile in Agency A

- The Client record exists in Agency A.

Figure 2: Consent from Agency A to Agency B

- A Consent is created from Agency A to Agency B.

Figure 3: Referral from Agency A to Agency B

- A Referral is created from Agency A to Agency B.
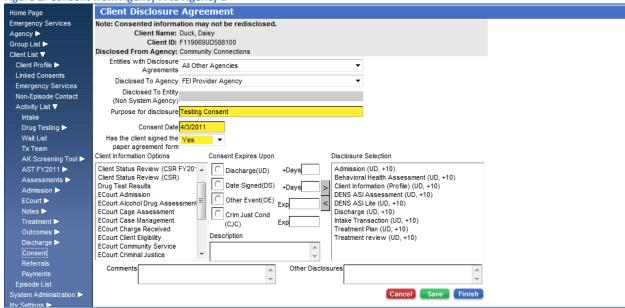
Figure 4: Agency B Client List, Prior to Accepting Referral

- In Agency B, a search for Daisy Duck shows that she has consented information, but does not already exist in Agency B. For the purposes of this scenario, we are assuming that she does not exist in Agency B under another name, either.
- Note that if you have the Clinical Supervisor or the WITS Administrator role, you will see the "Link" option in the Actions column.

Figure 5: Agency B Consented Activity List

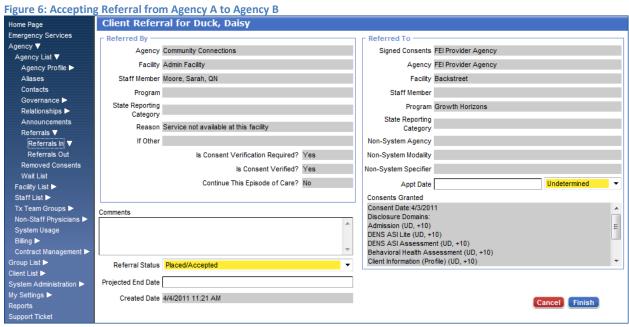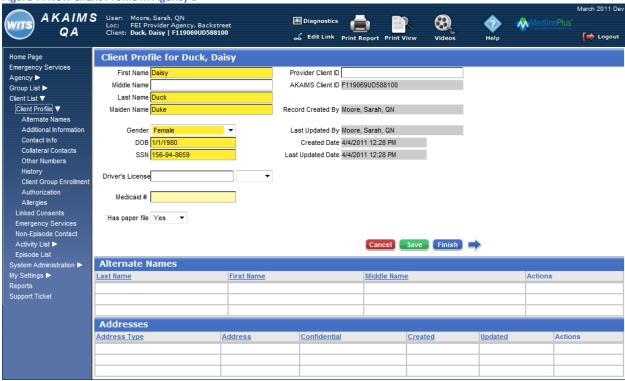|						
Home Page	**Consented Activity List from Community Connections for Duck, Daisy**					
Emergency Services	PROHIBITION ON REDISCLOSURE OF INFORMATION CONCERNING CLIENT IN ALCOHOL OR DRUG ABUSE TREATMENT					
Agency ▶	This notice accompanies a disclosure of information concerning a client in alcohol/drug abuse treatment, made to you with the consent of such client. This information has been disclosed to you from records protected by Federal confidentiality rules (42 CFR Part 2). The Federal rules prohibit you from making any further disclosure of this information unless further disclosure is expressly permitted by the written consent of the person to whom it pertains or as otherwise permitted by 42 CFR Part 2. A general authorization for the release of medical or other information is NOT sufficient for this purpose. The Federal rules restrict any use of the information to criminally investigate or prosecute any alcohol or drug abuse patient.					
Group List ▶						
Client List ▼						
Client Profile ▶						
Linked Consents	**Activity**	**Case #**	**Activity Date**	**Created Date**	**Status**	**Actions**
Emergency Services	Client Information (Profile)	1	4/4/2011	4/4/2011	In Progress	Review
Non-Episode Contact	Intake Transaction	1	4/4/2011	4/4/2011	In Progress	Review
Activity List ▼						
Episode List						
System Administration ▶						
My Settings ▶						

- If you select the "Activity List" Action link, you will be able to see the information that Agency A has shared with Agency B.

Figure 6: Accepting Referral from Agency A to Agency B

Home Page	**Client Referral for Duck, Daisy**
Emergency Services	
Agency ▼	**Referred By** — Agency: Community Connections; Facility: Admin Facility; Staff Member: Moore, Sarah, QN; Program: ; State Reporting Category: ; Reason: Service not available at this facility; If Other: ; Is Consent Verification Required? Yes; Is Consent Verified? Yes; Continue This Episode of Care? No
Agency List ▼	**Referred To** — Signed Consents: FEI Provider Agency; Agency: FEI Provider Agency; Facility: Backstreet; Staff Member: ; Program: Growth Horizons; State Reporting Category: ; Non-System Agency: ; Non-System Modality: ; Non-System Specifier: ; Appt Date: ; Undetermined
Agency Profile ▶	
Aliases	
Contacts	Consents Granted: Consent Date: 4/3/2011; Disclosure Domains: Admission (UD, +10); DENS ASI Lite (UD, +10); DENS ASI Assessment (UD, +10); Behavioral Health Assessment (UD, +10); Client Information (Profile) (UD, +10)
Governance ▶	
Relationships ▶	
Announcements	Comments
Referrals ▼	
Referrals In ▼	
Referrals Out	Referral Status: Placed/Accepted
Removed Consents	Projected End Date
Wait List	Created Date: 4/4/2011 11:21 AM
Facility List ▶	
Staff List ▶	Cancel Finish
Tx Team Groups ▶	
Non-Staff Physicians ▶	
System Usage	
Billing ▶	
Contract Management ▶	
Group List ▶	
Client List ▶	
System Administration ▶	
My Settings ▶	
Reports	
Support Ticket	

- Agency B accepts the Referral from Agency A.

Figure 7: New Client Profile in Agency B

- Accepting the Referral creates the new Client Profile in Agency B, since the client did not yet exist in Agency B.

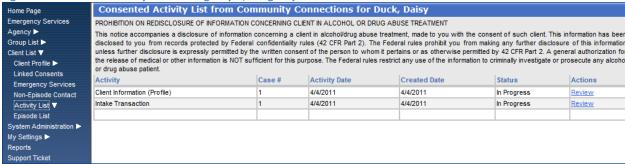**Figure 8: Client List in Agency B, After Accepting Referral**

- Daisy Duck's consented information from Agency A no longer appears on the Clients with Consents from Outside Agencies list.
- Note instead the Action link for "Linked Consents" on the Client List listing for Daisy Duck.

Figure 9: Linked Consents in Agency B

Linked Client Consents in Other Agencies							
Consenting Agency			▼				
					Clear	Cancel	Go
Linked Consent List							Add Link
Agency	Client Name	Client ID	DOB	SSN	Min Act. Date	Max Act. Date	Actions
Community Connections	Duck, Daisy	F119069UD588100	1/1/1980	156-94-8659	4/4/2011	4/4/2011	Activity List

Home Page / Emergency Services / Agency ▶ / Group List ▶ / Client List ▼ / Client Profile ▶ / Linked Consents / Emergency Services / Non-Episode Contact / Activity List ▶ / Episode List

- Selecting the "Linked Consents" Action link on the Client List will bring you to the Linked Consents screen.
- If there were multiple Consents for Daisy Duck from different Agencies, you would be able to filter the list based on Agency.
- Note the "Add Link" feature in the Linked Consent List header. This only appears for the Clinical Supervisor and the WITS Administrator.
- To view the Consented Activities, select the "Activity List" Action link.

Figure 10: Consented Activity List from Agency A, in Agency B

Consented Activity List from Community Connections for Duck, Daisy

PROHIBITION ON REDISCLOSURE OF INFORMATION CONCERNING CLIENT IN ALCOHOL OR DRUG ABUSE TREATMENT

This notice accompanies a disclosure of information concerning a client in alcohol/drug abuse treatment, made to you with the consent of such client. This information has been disclosed to you from records protected by Federal confidentiality rules (42 CFR Part 2). The Federal rules prohibit you from making any further disclosure of this information unless further disclosure is expressly permitted by the written consent of the person to whom it pertains or as otherwise permitted by 42 CFR Part 2. A general authorization for the release of medical or other information is NOT sufficient for this purpose. The Federal rules restrict any use of the information to criminally investigate or prosecute any alcohol or drug abuse patient.

Activity	Case #	Activity Date	Created Date	Status	Actions
Client Information (Profile)	1	4/4/2011	4/4/2011	In Progress	Review
Intake Transaction	1	4/4/2011	4/4/2011	In Progress	Review

Home Page / Emergency Services / Agency ▶ / Group List ▶ / Client List ▼ / Client Profile ▶ / Linked Consents / Emergency Services / Non-Episode Contact / Activity List ▼ / Episode List / System Administration ▶ / My Settings ▶ / Reports / Support Ticket

- Daisy Duck's Consented Activities from Agency A have been effectively removed from the Clients with Consents from Outside Agencies list, to become available instead through the Linked Consents menu item under her Client Profile.

C. Process Workflow – Existing Client

This follows the impact to the Consent & Referral processes, for Agencies B and C. In this second scenario, the client Daisy Duck already exists in both Agency B and Agency C.

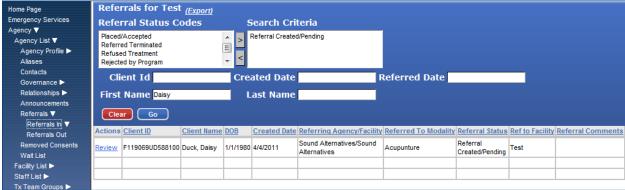**Figure 11: Consent from Agency C to Agency B**

- Agency C creates a Consent to Agency B for Daisy Duck.
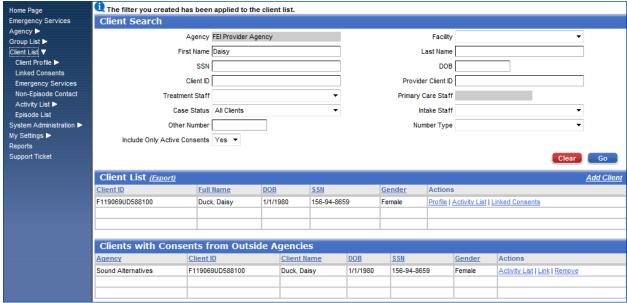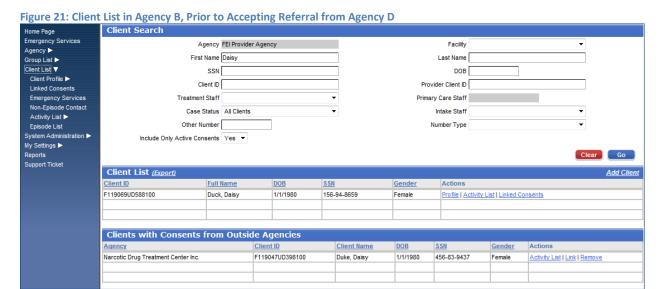
Figure 12: Referral from Agency C to Agency B

- Agency C creates a Referral to Agency B for Daisy Duck.

Figure 13: Referral Pending in Agency B

- The Referral in Agency B has not yet been accepted.

Figure 14: Client List in Agency B, Prior to Accepting Referral from Agency C

- Daisy Duck appears on the Client List because she already existed in Agency B.
- Daisy also exists on the Clients with Consents from Outside Agencies, because a new Consent for Daisy Duck has been granted to Agency B.

Figure 15: Referral from Agency C is Accepted in Agency B

- Agency B accepts the Referral from Agency C.

Figure 16: Client List in Agency B, After Accepting Referral from Agency C

- After accepting the Referral from Agency C, Daisy Duck no longer appears on the Clients with Consents from Outside Agencies.

Figure 17: Linked Consent List, After Accepting Referral from Agency C

- In Agency B, you can now see both Consents on the Linked Consents List, one from Agency A and one from Agency C.

D. Process Workflow – Linked Client

This follows the impact to the Client records and the Consent & Referral processes for Agencies B and D when Client records are linked. In this third scenario, the client Daisy Duck already exists in Agency B, and exists under another Client ID in Agency D.

Figure 18: Client Profile in Agency D

- In this Client Profile, you can see that Daisy Duke has a different last name and a different Social Security Number than the Daisy Duck in Agencies A, B, or C.

Figure 19: Consent from Agency D to Agency B

- Agency D creates a Consent record to Agency B for Daisy Duke.

Figure 20: Referral from Agency D to Agency B

- Agency D creates a Referral to Agency B for Daisy Duke.

Figure 21: Client List in Agency B, Prior to Accepting Referral from Agency D

- In Agency B, before they accept the Referral from Agency D, they can see that a Client named Daisy Duke has been consented to them.
- Daisy Duke and Daisy Duck have different last names and different Client IDs.
- The Clinical Supervisor knows that Daisy Duke is the same person as Daisy Duck, and wants to link the records.
- The Clinical Supervisor selects the "Link" option under the Actions column.

Figure 22: Link to Consented Client Screen in Agency B

- Selecting the "Link" option brings you to the Link to Consented Client screen, where you can search for the Client to link to.

Figure 23: Client Records to Link in Agency B

- A search for "Daisy" brings up Daisy Duck's record. To link to this record, select the "Link" option in the Actions column.

Figure 24: Confirmation of Consent Linkage in Agency B

- You will be asked to confirm the linkage between Daisy Duke and Daisy Duck.

Figure 25: Linked Consent List in Agency B, After Linking Consents

- Now all three Consents appear on the Linked Consent List for Daisy Duck.
- Note that the Consent that was manually linked has an Action item for "Unlink". This only appears if you have the Clinical Supervisor role or the WITS Administrator role, and only for records that were manually linked.

Figure 26: Accepting Referral from Agency D, in Agency B

- If the two records are already linked when you accept the Referral from Agency D, accepting the referral will not create a new Client record for Daisy Duke.
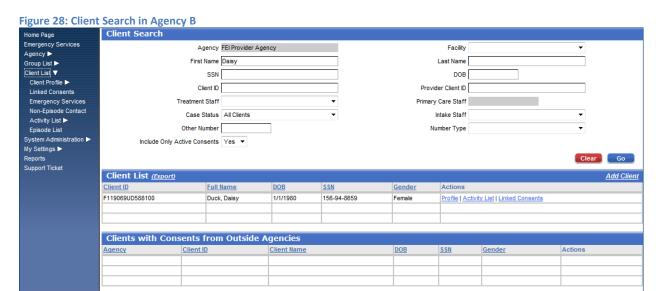
Figure 27: Existing Client Record in Agency B

- Accepting the Referral from Agency D for Daisy Duke will bring you to Daisy Duck's Client Profile, because you indicated that they are the same person.

E. Process Workflow – Unlinking a Client

This follows the impact to the Client records and the Consent & Referral processes for Agency B when two Client records are unlinked.
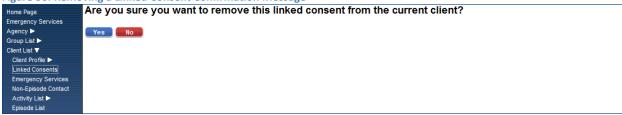
Figure 28: Client Search in Agency B

- When the Consents are Linked, the Consented Client does not show up on the Clients with Consents from Outside Agencies list.

Figure 29: Linked Consent List Prior to Unlinking Consent

- The Linked Consent List shows the Consented Client.
- If you have the Clinical Supervisor role or the WITS Administrator role, you can select the "Unlink" option from the Actions column.

Figure 30: Removing a Linked Consent Confirmation Message

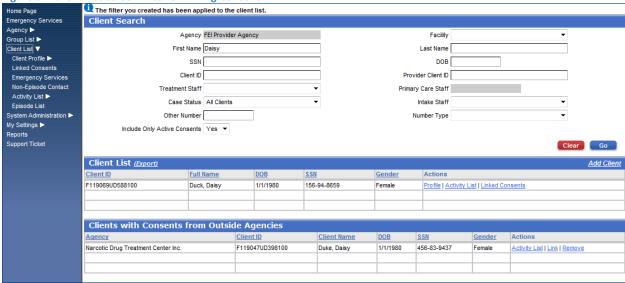- Selecting "Unlink" will prompt this warning message.

Figure 31: Linked Consent List After Unlinking Consent

- If you confirm that you want to Unlink the Consent, you will see that the Consented Daisy Duke is no longer appearing on the list under Daisy Duck's Profile.

Figure 32: Client List Screen After Unlinking Consent

- On the Client List screen, Daisy Duke now appears on the Clients with Consents from Outside Agencies list again.

Figure 33: Referrals In Screen After Unlinking Consent

- The Referral List indicates that the Referral was Placed/Accepted, but there is no associated Client Profile or Intake for Daisy Duke since the Consents were unlinked.

F. Any Intakes or additional clinical records created for this Client will remain under the Client record this Consent was linked to when they were created.